

BRAZIL

Post-flowering crop tours in Brazil have resulted in a series of downward crop revisions for the 2025/26 cycle. While area expansion and excellent husbandry are evident, the dryness and heat from August and September resulted in above-average flower abortions. On the positive side, temperature and precipitation during Q4 were optimal, supporting yields and screen size, something that has plagued the current crop. The other positive is a booming robusta crop that could surpass Vietnam as the world's largest producer in 2025.

COLOMBIA

Coffee flow has been low due to the holidays and the end of the Main crop. Midcrop is not expected to arrive soon with projections towards May, leaving a sizable gap with diminished availability. Climatic conditions have been favorable with sudden shifts between dryness and scattered showers.

MEXICO AND CENTRAL AMERICA

The coffee harvest has finally found its rhythm, and cherry maturation is almost complete. The early backlog in shipments from November and December persists, but it is expected to be caught up by the end of January or early February.

HONDURAS

Honduras reported a drop of 12.3% in December '24 coffee exports compared to the same month in 2023. The sluggish export numbers underline the early struggles of the Central American region after challenging climatic conditions delayed the crop.

PNG

Local activity has been slow due to the holidays. The fly crop continues to advance slowly but steadily and is expected to continue until the end of January.

VIETNAM

The harvest is 95% complete but the pace of sales by farmers remains behind schedule with only 25% of the crop commercialized.